

Effective Date: March 12, 2000

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

COLLEGE INVESTMENT PROGRAM FINANCE OFFICER

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under Wisconsin Administrative Code ER 2.04 for making classification decisions relative to a single professional position located at the Office of the State Treasurer which is responsible for assisting in the financial management of the Wisconsin College Tuition Savings Program and managing information systems operations for the Program. This classification specification is not intended to identify every duty which may be assigned to the position but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the classification concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification encompasses a professional position located at the Office of the State Treasurer which assists with the financial management of the Wisconsin College Tuition Savings Program and manages information systems operations for the Program. The position allocated to this classification must meet the definition of professional employee, as defined in s. 111.81(15), Wis. Stats.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions which do not meet the statutory definition of professional employee, as defined in s. 111.81(15), Wis. Stats.
2. Positions which do not assist with the financial management of the Wisconsin College Tuition Savings Program and manage information systems operations for the Program for a majority of the time.
3. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Entrance into this classification is by competitive examination.

II. DEFINITION

COLLEGE INVESTMENT PROGRAM FINANCE OFFICER

This is professional work related to the management of the Wisconsin College Tuition Savings Program, or "EdVest Wisconsin." The position allocated to this classification participates in the development and implementation of financial, investment, and program tracking systems; structures investments to maximize program objectives; coordinates program systems with various existing state systems; develops and maintains a records management and data information system for investment accounts; coordinates fiduciary investments, banking relationships, and lockbox services to ensure compliance with policies and accounting principles, and to obtain services at the lowest possible cost; and assists the College Investment Program Supervisor in developing policy and legislative proposals. Work is performed under general supervision.

III. QUALIFICATIONS

The qualifications required for this position will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities to be performed and by an identification of the education, training, work, or other life experience(s) which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification specification was created effective March 12, 2000, and announced in Bulletin CLR/SC-109, in order to identify a professional position located at the Office of the State Treasurer which participates in the management of the Wisconsin College Tuition Savings Program. This classification reflects the transfer of the program from the Department of Administration to the State Treasurer's Office and replaces the Capital Finance Program Officer classification which was created effective April 13, 1997, and abolished effective March 12, 2000 (see bulletins CC/SC-65 and CLR/SC-109, respectively). This classification was created as a result of the Department of Employment Relations' expansion of the broadband pay system.

SKN
04490